Medical Care Collection Fund (MCCF) eInsurance Compliance Phase 3

RELEASE NOTES/Installation Guide/Rollback Plan

IB*2.0*549

Department of Veterans Affairs

August 2016

Version 4.0

Office of Information and Technology (OI&T)

Table of Contents

1 Introduction

Below is a list of all the applications involved in this project along with their patch number:

```
APPLICATION/VERSION                PATCH
-------------------------------------------------------------------
INTEGRATED BILLING (IB) V. 2.0     IB*2.0*549
REGISTRATION (DG) V. 5.3           DG*5.3*916
```

The patches (IB*2.0*549 and DG*5.3*916) are being released in the Kernel Installation and Distribution System (KIDS) multi-build distribution as IB_DG_BUNDLE_1_0.KID.

The purpose of this patch is to meet the requirements of the Medical Care Collection Fund (MCCF) eInsurance Compliance Phase 3 project related to Integrated Billing (IB). eInsurance provides Insurance identification and verification which is vital to the success of the Department of Veterans Affairs (VA) revenue collection process. Accurate insurance information is needed to effectively submit claims and collect payments from third-party payers for medical care and services provided to Veterans by the Veterans Health Administration (VHA).

1.1 Documentation and Distribution

Updated documentation describing the new functionality introduced by this patch is available.

The preferred method is to SFTP the files from download.vista.med.va.gov. This transmits the files from the first available server. Sites may also elect to retrieve software directly from a specific server.

Sites may retrieve the documentation directly using Secure File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Albany	fo-albany.med.va.gov
Hines	fo-hines.med.va.gov
Salt Lake City	fo-slc.med.va.gov

Documentation can also be found on the VA Software Documentation Library at:
http://www4.va.gov/vdl/

Title	File Name	FTP Mode
Release Notes/Installation Guide	ib_2_0_p549_rn.pdf	Binary
Claims Tracking User Guide	ib_2_0_CT_ug.pdf	Binary
EDI User Guide	edi_user_guide.pdf	Binary
eIV Technical/Security Manual	ib_2_0_eiv_tm.pdf	Binary
eIV User Guide	ib_2_0_eiv_ug.pdf	Binary
IB Technical Manual	ib_2_0_tm.pdf	Binary
IB User Manual	ib_2_0_um.pdf	Binary

2 Patch Description and Installation Instructions

2.1 Patch Description

VistA Patch Display   Page: 1
==
Run Date: AUG 18, 2016   Designation: IB*2*549
Package : INTEGRATED BILLING   Priority   : MANDATORY
Version : 2   Status   : COMPLETE/NOT RELEASED
==

Associated patches: (v)IB*2*366   <<= must be installed BEFORE `IB*2*549'
                    (v)IB*2*516   <<= must be installed BEFORE `IB*2*549'
                    (v)IB*2*521   <<= must be installed BEFORE `IB*2*549'
                    (v)IB*2*528   <<= must be installed BEFORE `IB*2*549'
                    (v)IB*2*533   <<= must be installed BEFORE `IB*2*549'
                    (v)DSIV*2.2*12   <<= must be installed BEFORE `IB*2*549'

Subject: EINSURANCE-COMPLIANCE PHASE 3 FY15

Category: ROUTINE
           DATA DICTIONARY
           ENHANCEMENT
           INPUT TEMPLATE
           OTHER

Description:
=========

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with their patch number:

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    REGISTRATION (DG) V. 5.3   DG*5.3*916

The patches (IB*2.0*549 and DG*5.3*916) are being released in the
Kernel Installation and Distribution System (KIDS) multi-build
distribution as IB_DG_BUNDLE_1_0.KID.

    ****
    *   *
    * If the following Mail Group does not exist it will be created   *
    * as part of the install but with no members. Read the installation   *
    * log to determine if this Mail Group had to be created. If the   *
    * Mail Group was created as part of the install please email   *
    * "VHAeInsuranceRapidResponse@va.gov" to ask who should be added to   *
    * the group. It is strongly recommended that at least on member   *
    * be assigned to the Mail Group.   *

```
*                                                                    *
*  Mail Group:   IBCNE EIV MESSAGE                                    *
*                                                                    *
*********************************************************************
```

The purpose of this patch is to meet the requirements of the Medical Care
Collection Fund (MCCF) eInsurance Compliance Phase 3 project related to
Integrated Billing (IB). eInsurance provides Insurance identification
and verification which is vital to the success of the Department of
Veterans Affairs (VA) revenue collection process. Accurate insurance
information is needed to effectively submit claims and collect payments
from third-party payers for medical care and services provided to
Veterans by the Veterans Health Administration (VHA).

The following features of the IB software will be affected by this
project:

1) Electronic Insurance Verification (eIV):
*   eIV data extracts and eIV Request Electronic Insurance Inquiry:
     o eIV Appointment extract will include Prescription only
        coverages.
     o eIV Appointment extract will include Prescription type of
        plans.
     o eIV Appointment extract will exclude specific types of
        coverages.
     o eIV Appointment extract will exclude specific types of
        plans.
     o eIV Request Electronic Insurance Inquiry will allow inquiries
        for deceased patients, but will not use Date of Death (DOD) as
        the service date.

*   eIV processing and transmission:
     o   eIV Auto Update will only update active policies.
     o   "IIV EC" Health Level Seven (HL7) logical link will use a
          domain name.

2) Modifications to several screens in Integrated Billing:
*   Date of Death:
     o When a patient is marked as deceased in Veterans Health
        Information Systems and Technology Architecture (VistA), their
        active policies will automatically be termed.
     o Patient Policy information screen will reflect the patient's
        date of death.

*   Security Key:
     o Existing "IB GROUP PLAN EDIT" security key is required to edit
        Coverage Limitations (action CV) within:
        - The Insurance Company Entry/Edit option on the Insurance
          Company screen.
        - The Patient Insurance Info View/Edit option on the Patient
          Insurance screen.

- o Existing "IB GROUP PLAN EDIT" security key is required to edit
  Annual Benefits (action AB) within:
  - The Insurance Company Entry/Edit option on the Insurance
    Company screen.
  - The Patient Insurance Info View/Edit option on the Patient
    Insurance screen.
- o Existing "IB GROUP PLAN EDIT" security key is required to edit
  Change Plan Info (action PI) within:
  - The Insurance Company Entry/Edit option on the Insurance
    Company screen.
  - The Patient Insurance Info View/Edit option on the Patient
    Insurance screen.
- o Existing "IB GROUP PLAN EDIT" security key is required to edit
  UR Info (action UI) within:
  - The Insurance Company Entry/Edit option on the Insurance
    Company screen.
  - The Patient Insurance Info View/Edit option on the Patient
    Insurance screen.
- o Existing "IB GROUP PLAN EDIT" security key is required to
  Inactivate a Plan (action IP) within:
  - The Insurance Company Entry/Edit option on the Insurance
    Company screen.
  - The Patient Insurance Info View/Edit option on the Patient
    Insurance screen.
- o Existing "IB GROUP PLAN EDIT" security key is required to Edit
  Comments (action PC) within the Insurance Company Entry/Edit
  option on the Insurance Company screen.
- o Existing "IB GROUP PLAN EDIT" security key is required to Fast
  Edit All (action EA) plan specific information within the Patient
  Insurance Info View/Edit option on the Patient Insurance
  screen.

* Process Insurance Buffer option and eIV Response data:
  - o Insurance Buffer will no longer allow a user to directly
    access the eIV Response Report via RR action.
  - o Insurance Buffer's expand benefit (action EB) will include additional eIV
    Response data.
  - o Insurance Buffer's accept entry (action AE) process will allow acceptance
    of additional eIV Response data.
  - o Insurance Buffer will display all Medicare entries to all
    users.

* Patient Insurance screen (Patient Insurance Info View Entry/Edit
  option):
  - o Patient Insurance screen will display additional eIV Response
    data.
  - o "Policy Not Billable" prompt will be modified to "Stop Policy From Billing" to make it more
    clear to the user.

* Insurance Company screen (Insurance Company Entry/Edit option):
    o The Expand Benefits action (EB) will display additional eIV
      Response data.

* Enhance VistA Insurance Capture Buffer (ICB):
    o ICB will not create a new insurance company if the user lacks
      the proper security key.
    o ICB will not create a new group plan if the user lacks the
      proper security key or it already exists.

* Enhance VistA Data Dictionary (DD):
    o Create new entry in the file TYPE OF INSURANCE COVERAGE
      (#355.2).
    o Create new entry in the file TYPE OF PLAN (#355.1).

3) Reports:
* List Plans by Insurance Company report:
    o Added additional filters.
    o Modified the report layout.

* Patients without Medicare Insurance report:
    o Modified user prompts.
    o Added a new filter based on appointment date.
    o Modified the report layout.

* Active Policies with no Effective Date report:
    o Added additional filters.
    o Modified the report layout.

* eIV Auto Update Report (currently known as the eIV Patient
  Insurance Update Report):
    o Renamed eIV Patient Insurance Update report to eIV Auto Update
      Report.
    o Updated the user prompts.
    o Modified the report to display only those patient insurance
      entries that were updated by eIV Auto Update.
    o Modified the report layout.

* Creation of new Insurance Plans Missing Data report:
    o Create new report that allows a user to search for missing data
      within active insurance companies.
    o Users may search the following fields in the GROUP INSURANCE
      PLAN file (#355.3) looking for missing data:
      - GROUP NUMBER (#2.02).
      - TYPE OF PLAN (#.09).
      - PLAN STANDARD FTF (#.16).
      - PLAN STANDARD FTF VALUE (#.17).
      - ELECTRONIC PLAN TYPE (#.15).
      - BANKING IDENTIFICATION NUMBER (#6.02).
      - PROCESSOR CONTROL NUMBER (PCN) (#6.03).

      o Users may search for missing plan coverage limitations that are
         found in the PLAN COVERAGE LIMITATIONS file (#355.32).

*   Modifications to the worklist, Move Subscribers to a Different
    Plan:
      o Added functionality so that a user may move individual patients
         instead of an entire group if they desire.
      o Added additional user prompts.

4) Modifications to the Patient Policy Comments:
*   Insurance Comments (Patient Insurance Info View Entry/Edit option):
      o Provided ability to capture additional data for patient policy
         comments.
      o Removed the "Insur. Contact Inf. (IC)" action from the Patient
         Policy Information screen.
      o Removed the Insurance Comment (last) section from the Patient
         Policy Information screen.
      o Added new "Group Plan Comment (GC)" action to the Patient
         Policy Information screen.
      o Added ability for users to view the historical list of patient
         policy comments.
      o Provided search functionality for historical patient policy
         comments.

*   Insurance Comments (Claims Tracking screens/options):
      o Added new "Pt Policy Comments (PT)" action to claims tracking
         screens.
      o Added ability for users to view the historical list of
         patient policy comments.

*   Insurance Comments (Third Party Joint Inquiry (TPJI) option):
      o Added new "Pt Policy Comments (PT)" action to TPJI when PATIENT NAME is selected.
         Selecting by BILL NUMBER in TPJI has not been modified.
      o Added ability for users to view the historical list of patient
         policy comments.

5) Modifications to the IV Site Parameters:
*   IV Site Parameters:
      o Redesigned user screen.
      o Allows edit functionality of the following data elements:
        - Medicare Payer.
        - HMS Directory.
        - EII Active
      o Displays in view only mode:
        - Retry Flag.
        - Timeout Days.
        - Timeout Mailman Msg.
        - Number Retries.
        - Default Service Type Code.
        - HL7 Maximum Number.

- o Removed functionality of the following data elements:
  - Contact Person.
  - Contact's phone number.
  - Contact's email address.
- o Added the following new data elements:
  - Master Switch Realtime.
  - Master Switch Nightly.
- o Removed edit abilities for the data elements:
  - Failure Mailman Msg.
  - Messages Mailgroup.

6) Modification to the existing National Insurance File (NIF) Interface:
* Sending HL7 messages to the NIF:
  - o VistA now checks the IB NIF TCP entry in the HL7 logical link
    and verifies that it is up and running. An email is generated
    and sent to VHAeInsuranceRapidResponse@va.gov when the IB NIF
    TCP entry needs to be restarted/bounced..

Patch Components
================

Files & Fields Associated:

File Name (#) Sub-file Name (#)	Field Name (Number)	New/Modified/ Deleted
------------------	--------------------------------	-------------
PATIENT (#2)		Modified
INSURANCE TYPE sub-file (#2.312)		Modified
	STOP POLICY FROM BILLING (#3.04)	Modified
	EB DISPLAY ENTRY (#8.03)	New
COMMENT - SUBSCRIBER POLICY sub-file (#2.342)		Modified
	PERSON CONTACTED (#.04)	New
	CONTACT PHONE # (#.05)	New
	CALL REFERENCE NUMBER (#.06)	New
	METHOD OF CONTACT (#.07)	New
	AUTHORIZATION NUMBER (#.08)	New
IB SITE PARAMETERS (#350.9)		Modified
	CONTACT PERSON (#51.16)	Modified
	270 MASTER SWITCH REALTIME (#51.27)	New
	270 MASTER SWITCH NIGHTLY (#51.28)	New
	DAILY NIF STATUS CHECK TIME (#51.29)	New
IIV RESPONSE (#365)		Modified
	DO NOT PURGE (#.11)	New

Bulletins Associated:

```
                              New/Modified/
Bulletin Name                 Deleted
------------------            ------------------
N/A


Dialogs Associated:

                              New/Modified/
Dialog Name                   Deleted
----------------              ------------------
N/A


Forms Associated:

                                                  New/Modified/
Form Name               File Name (Number)        Deleted
---------------         ------------------------  ------------------
N/A


Functions Associated:

                              New/Modified/
Function Name                 Deleted
------------------            ------------------
N/A


HL Logical Link:

                              New/Modified/
HL Logical Name               Deleted
----------------------        ------------------
N/A


HL7 Application Parameters:

                              New/Modified/
HL7 Parameter Name            Deleted
-------------------------     ------------------
N/A


HLO Application Registry:

                              New/Modified/
HLO Registry Name             Deleted
-------------------------     ------------------
N/A



Help Frames Associated:
```

```
                              New/Modified/
Help Frame Name               Deleted
----------------------        ------------------
N/A



Mail Groups Associated:
                              New/Modified/
Mail Group Name               Deleted
---------------------         ------------------
N/A



Options Associated:
                                            New/Modified/
Option Name                   Type          Deleted
-----------------             -------       ------------------
IBCN INS PLANS MISSING DATA   run routine   New
IBCN INS RPTS                 menu          Modified
IBCN INSURANCE MGMT MENU      menu          Modified
IBCNE EIV UPDATE REPORT       run routine   Modified



Parameter Definitions:
                              New/Modified/
Parameter Name                Deleted
---------------------         ------------------
N/A



Parameter Template:
                              New/Modified/
Template Name                 Deleted
-------------------           ------------------
N/A



Protocols Associated:
                              New/Modified/
Protocol Name                 Deleted
------------------            ------------------
IBCN INS CO ACTIVE MENU       New
IBCN INS CO ACTIVE UNSELECT   New
IBCN INS CO MENU              New
IBCN INS CO NEW SEARCH        New
IBCN INS CO SELECT            New
IBCN INS CO SHOW SEL          New
IBCN INS CO UNSELECT          New
IBCN SUBSCRIBER ACTIVE MENU   New
IBCN SUBSCRIBER ACTIVE UNSELECT   New
IBCN SUBSCRIBER MENU          New
```

IBCN SUBSCRIBER SELECT	New
IBCN SUBSCRIBER SHOW SEL	New
IBCN SUBSCRIBER SORT LIST	New
IBCN SUBSCRIBER UNSELECT	New
IBCNB ELIG PAYER SUMMARY	New
IBCNB ENTRY EDIT ALL	Attach to menu
IBCNB ENTRY EDIT GROUP	Attach to menu
IBCNB ENTRY EDIT INSURANCE	Attach to menu
IBCNB ENTRY EDIT POLICY	Attach to menu
IBCNB ENTRY ESCALATE	Attach to menu
IBCNB ENTRY SCREEN MENU	Modified
IBCNB EXPAND BENEFITS	Attach to menu
IBCNB FAST EXIT	Attach to menu
IBCNCH ADD COMMENT	New
IBCNCH COMMENT HISTORY EXPAND	New
IBCNCH COMMENT HISTORY EXPAND VIEW	New
IBCNCH COMMENT HISTORY MENU	New
IBCNCH COMMENT HISTORY SEARCH	New
IBCNCH COMMENT HISTORY VIEW	New
IBCNCH DELETE COMMENT	New
IBCNCH DELETE COMMENT EXPAND	New
IBCNCH EDIT COMMENT	New
IBCNCH EDIT COMMENT EXPAND	New
IBCNCH EXPAND COMMENT	New
IBCNCH EXPAND COMMENT VIEW	New
IBCNCH PREVIOUS COMMENT	New
IBCNCH SEARCH LIST	New
IBCNCH SEARCH LIST EXPAND	New
IBCNCH SEARCH NEXT	New
IBCNE ELIG BEN INFO MENU	Modified
IBCNE ELIG PAY SUM MENU	New
IBCNE FAST EXIT	Attach to menu
IBCNE VP VIEW EXP ELIG BEN SCREEN	Attach to menu
IBCNS EXIT	Attach to menu
IBCNSJ CHANGE PLAN	Attach to menu
IBCNSJ EDIT COVERAGE LIMITS	Attach to menu
IBCNSJ INACTIVATE PLAN	Attach to menu
IBCNSP ADD GROUP COMMENT	New
IBCNSP ANNUAL BENEFITS	Attach to menu
IBCNSP BENEFITS USED	Attach to menu
IBCNSP EDIT ALL	Attach to menu
IBCNSP EDIT EFFECTIVE DATES	Attach to menu
IBCNSP EDIT POLICY INFO	Attach to menu
IBCNSP EMPLOYER INFO FOR CLAIMS	Attach to menu
IBCNSP PATIENT POLICY COMMENTS ADD/EDIT	New
IBCNSP PATIENT POLICY COMMENTS VIEW	New
IBCNSP POLICY MENU	Modified
IBCNSP SUBSCRIBER UPDATE	Attach to menu
IBCNSP UR INFO	Attach to menu
IBCNSP VERIFY COVERAGE	Attach to menu
IBCNSV POLICY MENU	Modified

IBJ EXIT	Attach to menu
IBJP IIV GENERAL EDIT	Attach to menu
IBJP INS VER MENU	Modified
IBJT ACTIVE LIST SCREEN SKIP	Attach to menu
IBJT PATIENT POLICY COMMENTS VIEW	New
IBJT SHORT MENU 2	New
VALM BLANK 1	Attach to menu
VALM BLANK 2	Attach to menu

Remote Procedures Associated:

Remote Procedure Name	New/Modified/ Deleted
-----------------------------	------------------
N/A	

Security Keys Associated:

Security Key Name	New/Modified/ Deleted
------------------------	------------------
N/A	

Templates, Input Associated:

Template Name	Type	File Name (Number)	New/Modified/ Deleted
-------------------	------	---------------------------	------------------
IBCNE GENERAL PARAMETER EDIT	Input	IB SITE PARAMETERS (#350.9)	Modified

Templates, List Associated:

Template Name	Type	New/Modified/ Deleted
-------------------	------	------------------
IBCN INS CO SELECTED	List	New
IBCN INS CO SELECTOR	List	New
IBCN SUBSCRIBER SELECTED	List	New
IBCN SUBSCRIBER SELECTOR	List	New
IBCNB INSURANCE BUFFER PAYER	List	New
IBCNCH POL COMMENT EXPAND VIEW	List	New
IBCNCH POLICY COMMENT EXPAND	List	New

IBCNCH POLICY COMMENT HISTORY	List	New
IBCNCH POLICY COMMENT SEARCH	List	New
IBCNCH POLICY COMMENT VIEW	List	New
IBJP IIV SITE PARAMETERS	List	Modified

Templates, Print Associated:

Template Name	Type	File Name (Number)	New/Modified/ Deleted
------------------	------	------------------------	------------------
N/A			

Templates, Sort Associated:

Template Name	Type	File Name (Number)	New/Modified/ Deleted
------------------	------	------------------------	------------------
N/A			

Additional Information:

N/A

New Service Requests (NSRs)

NSR 20140413 - Medical Care Collection Fund (MCCF) eInsurance Compliance Phase 3

Patient Safety Issues (PSIs)

N/A

Defect Tracking System Ticket(s) & Overview

N/A

Test Sites:

Bay Pines, FL
Central Plains HCS
Chillicothe, OH
Louisville, KY

Documentation Retrieval Instructions

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patch is available.

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Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI
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Albany	fo-albany.med.va.gov
Hines	fo-hines.med.va.gov
Salt Lake City	fo-slc.med.va.gov

Documentation can also be found on the VA Software Documentation Library
at: http://www4.va.gov/vdl/

Title	File Name	FTP Mode
Release Notes/Installation Guide	ib_2_0_p549_rn.pdf	Binary
Claims Tracking User Guide	ib_2_0_CT_ug.pdf	Binary
EDI User Guide	edi_user_guide.pdf	Binary
eIV Technical Manual/Security Manual	ib_2_0_eiv_tm.pdf	Binary
eIV User Guide	ib_2_0_eiv_ug.pdf	Binary
IB Technical Manual	ib_2_0_tm.pdf	Binary
IB User Manual	ib_2_0_um.pdf	Binary

Patch Installation:

Pre/Post Installation Overview

DO NOT QUEUE the installation of this patch.

To avoid disruptions, these patches should be installed during non-peak
hours when there is minimal activity on the system and there are no
Integrated Billing users on the system.

Do not delete the post install routine "IBY549PO" after the install has
been completed, as a task has been queued to run in the background and it
needs this routine to complete.

Pre-Installation Instructions

```
 ******************************************************************
 *  You should install this patch during non-peak hours, when no          *
 *  Integrated Billing users are on the system.                           *
 ******************************************************************
```

This patch may be installed with users on the system although it is
strongly recommended that it be installed during non-peak hours to
minimize potential disruption to users. This patch should take less
than 10 minutes to install.

The following Menu Options at the site should be disabled during
install:

PROCESS INSURANCE BUFFER	[IBCN INSURANCE BUFFER PROCESS]
MCCR SITE PARAMETER DISPLAY/EDIT	[IBJ MCCR SITE PARAMETERS]
INSURANCE COMPANY ENTRY/EDIT	[IBCN INSURANCE CO EDIT]
PATIENT INSURANCE INFO VIEW/EDIT	[IBCN PATIENT INSURANCE]
EIV RESPONSE REPORT	[IBCNE IIV RESPONSE REPORT]
CLAIMS TRACKING MENU FOR BILLING	[IBT USER MENU (BI)]
CLAINS TRACKING MENU (HOSPITAL REVIEWS)	[IBT USER MENU (HR)]
CLAIMS TRACKING MENU FOR (INSURANCE REVIEWS)	[IBT USER MENU (IR)]
CLAIMS TRACKING MENU FOR (COMBINED FUNCTIONS)	[IBT USER COMBINED MCCR/UR MENU]

```
 ******************************************************************
 *  IMPORTANT: The IIV EC HL7 Logical Link will need to be shut down before *
 *             installing IB*2.0*549 and restarted after the installation is     *
 *             complete.                                                          *
 ******************************************************************
```
        To shut down the IIV EC HL7 Logical Link perform the following
        steps.

        1. At the option prompt, select the option: HL7 MAIN MENU
        2. Then select the option: FILER and Link Management Options
        3. Then select the option: START/Stop Links
        4. When prompted for "HL LOGICAL LINK NODE", enter "IIV EC"
        5. When prompted for "Okay to shut down this job?", enter
            "YES"

```
 ********************************************************************
 *  IMPORTANT: The VistA option eIV Nightly Process [IBCNE IIV BATCH PROCESS] *
 *             should be unscheduled in TaskMan before installing IB*2.0*549.     *
 ********************************************************************
```

It will be necessary to unschedule the eIV Nightly Process
[IBCNE IIV BATCH PROCESS] option before installing the patch.

An example of how to unscheduled this option in TaskMan is
shown below:

eIV Nightly Process [IBCNE IIV BATCH PROCESS] option
----

1. At the option prompt select the option: Taskman Management
2. When prompted for "Select Taskman Management Option", enter
   "Schedule/Unschedule Options"
3. When prompted for "Select OPTION to schedule or reschedule",
   enter "IBCNE IIV BATCH PROCESS"
4. When prompted for " ...OK? Yes//", enter "YES"

   Example below:

              Edit Option Schedule
   Option Name: IBCNE IIV BATCH PROCESS
   Menu Text: eIV NIGHTLY PROCESS   TASK ID: 279418

_____

   QUEUED TO RUN AT WHAT TIME: SEP 4,2013@07:00 @ ?

                      >> Note what time this is scheduled to run as
                      >> you will need to reenter that time later
                      >> when you are rescheduling it again
                      >> (see post install).
                      >> Enter the '@' sign as shown above.
                      >> This will automatically delete the date/time

DEVICE FOR QUEUED JOB OUTPUT:

 QUEUED TO RUN ON VOLUME SET:

   RESCHEDULING FREQUENCY: 1D

     TASK PARAMETERS:

     SPECIAL QUEUEING:

_____

Exit   Save   Next Page   Refresh

Enter a command or '^' followed by a caption to jump to a specific field.

```
   Edit Option Schedule
   Option Name: IBCNE IIV BATCH PROCESS
   Menu Text: eIV NIGHTLY PROCESS                TASK ID:

_____

 QUEUED TO RUN AT WHAT TIME:

DEVICE FOR QUEUED JOB OUTPUT:

 QUEUED TO RUN ON VOLUME SET:

   RESCHEDULING FREQUENCY: 1D

      TASK PARAMETERS:

      SPECIAL QUEUEING:

_____
Exit     Save     Next Page     Refresh
```

Enter a command or '^' followed by a caption to jump to a specific field.

COMMAND: S ? Save the work

>> Enter 'S' to Save, as shown above.

```
   Edit Option Schedule
   Option Name: IBCNE IIV BATCH PROCESS
   Menu Text: eIV NIGHTLY PROCESS                TASK ID:

_____

 QUEUED TO RUN AT WHAT TIME:

DEVICE FOR QUEUED JOB OUTPUT:

 QUEUED TO RUN ON VOLUME SET:

   RESCHEDULING FREQUENCY: 1D

      TASK PARAMETERS:
```

SPECIAL QUEUEING:

_____

Exit   Save   Next Page   Refresh

Enter a command or '^' followed by a caption to jump to a specific field.

COMMAND: E ? Exit, You're done

                >> Enter 'E' to Exit, as shown above.

Installation Instructions

**** Do not install this patch without shutting down the IIV EC HL7
Logical link. Please refer to the Pre-Installation instructions for
directions on how to shut down the IIV EC HL7 Logical Link. ****

**** Do not install this patch when the eIV NIGHTLY PROCESS [IBCNE IIV
BATCH PROCESS] background job is running or scheduled to run. Please refer
to the Pre-installation instructions for the un-scheduling of this
option. ****

1. OBTAIN PATCHES

    Obtain the host file IB_DG_BUNDLE_1_0.KID which contains the
    following patches:

      IB*2.0*549
      DG*5.3*916

    Sites can retrieve VistA software from download.vista.med.va.gov. This
    transmits the file from the first available server. Sites may also
    elect to retrieve this file directly from a specific server.

    Sites may retrieve software directly using Secure File Transfer
    Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following
    OI Field Offices:

      Albany   fo-albany.med.va.gov
      Hines   fo-hines.med.va.gov
      Salt Lake City   fo-slc.med.va.gov

    The IB_DG_BUNDLE_1_0.KID host file is located in the
    anonymous.software directory. Use the American Standard Code for
    Information Interchange (ASCII) Mode when downloading the file.

2. START UP KIDS

```
-----------------------
Start up the Kernel Installation and Distribution System Menu option
[XPD MAIN]:

   Edits and Distribution ...
   Utilities ...
   Installation ...

Select Kernel Installation & Distribution System Option: Installation
                                                         ----

   Load a Distribution
   Print Transport Global
   Compare Transport Global to Current System
   Verify Checksums in Transport Global
   Install Package(s)
   Restart Install of Package(s)
   Unload a Distribution
   Backup a Transport Global

Select Installation Option:
```

3. LOAD TRANSPORT GLOBAL FOR MULTI-BUILD

    From the Installation menu, select the Load a Distribution option.

    When prompted for "Enter a Host File:", enter the full directory path
    where you saved the host file IB_DG_BUNDLE_1_0.KID (e.g.,
    SYS$SYSDEVICE:[ANONYMOUS]IB_DG_BUNDLE_1_0.KID).

    When prompted for "OK to continue with Load? NO//", enter "YES."

    The following will display:

```
   Loading Distribution...

     IB DG BUNDLE 1.0
     IB*2.0*549
     DG*5.3*916
```

     Use INSTALL NAME: IB DG BUNDLE 1.0 to install this distribution.

4. RUN INSTALLATION OPTIONS FOR MULTI-BUILD

    From the Installation menu, you may select to use the following
    options (when prompted for the INSTALL NAME, enter
    IB DG BUNDLE 1.0):

    a. Backup a Transport Global - This option will create a backup
       message of any routines exported with this patch. It will not
       backup any other changes such as data dictionaries or templates.

b. Compare Transport Global to Current System - This option will
   allow you to view all changes that will be made when this patch
   is installed. It compares all components of this patch
   (routines, data dictionaries, templates, etc.).
c. Verify Checksums in Transport Global - This option will allow
   you to ensure the integrity of the routines that are in the
   transport global.

5. INSTALL MULTI-BUILD

    This is the step to start the installation of this KIDS patch. This
    will need to be run for the IB DG BUNDLE 1.0.

    a. Choose the Install Package(s) option to start the patch install.
    b. When prompted 'Select INSTALL NAME:', enter IB DG BUNDLE 1.0.

6. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of
    Install? NO//', enter NO.

7. When prompted 'Want KIDS to INHIBIT LOGONs during the install?
    NO//', enter NO.

8. When prompted 'Want to DISABLE Scheduled Options, Menu Options,
    and Protocols? YES//', enter YES.

    When prompted 'Enter options you wish to mark as 'Out Of Order':
        Enter the following options one at a time:

PROCESS INSURANCE BUFFER   [IBCN INSURANCE BUFFER PROCESS]
MCCR SITE PARAMETER DISPLAY/EDIT   [IBJ MCCR SITE PARAMETERS]
INSURANCE COMPANY ENTRY/EDIT   [IBCN INSURANCE CO EDIT]
PATIENT INSURANCE INFO VIEW/EDIT   [IBCN PATIENT INSURANCE]
EIV RESPONSE REPORT   [IBCNE IIV RESPONSE REPORT]
CLAIMS TRACKING MENU FOR BILLING   [IBT USER MENU (BI)]
CLAINS TRACKING MENU   [IBT USER MENU (HR)]
  (HOSPITAL REVIEWS)
CLAIMS TRACKING MENU FOR   [IBT USER MENU (IR)]
  (INSURANCE REVIEWS)
CLAIMS TRACKING MENU FOR   [IBT USER COMBINED MCCR/UR MENU]
  (COMBINED FUNCTIONS)

    When prompted 'Enter protocols you wish to mark as 'Out Of Order':
        Press the Return or Enter key as there are no protocols that
        needs to be marked as 'Out of Order'.

9. If prompted "Delay Install (minutes): (0 - 60): 0// respond 0.

10. When prompted "Device: HOME//", respond with the correct device
    but do * NOT * queue this install.

Post-Installation Instructions

In order to verify the patch post-installation routine was run
successfully, please examine the Install File for this patch and
report any error messages to Product Support.


```
*********************************************************************
* IMPORTANT                                                        *
* Once the patch has COMPLETED INSTALLATION, the IIV EC HL7        *
* Logical Link that was stopped during pre-installation must be    *
* restarted. Please follow the steps in the pre-installation       *
* for stopping the IIV EC HL7 Logical Link to restart it. NOTE:    *
* step 4 is not prompted when restarting an HL7 Logical Link.      *
*********************************************************************
```



```
*********************************************************************
* IMPORTANT                                                        *
* Once the patch has COMPLETED INSTALLATION, reschedule the eIV    *
* NIGHTLY PROCESS [IBCNE IIV BATCH PROCESS] option that was        *
* unscheduled during pre-installation.                             *
*********************************************************************
```


Routine Information:
====================

The second line of each of these routines now looks like:
;;2.0;INTEGRATED BILLING;**[Patch List]**;21-MAR-94;Build 54

The checksums below are new checksums, and
 can be checked with CHECK1^XTSUMBLD.

Routine Name: IBAMTC
   Before: B26484499   After: B27117465 **34,52,70,93,100,118,115,132,
                        150,153,137,176,215,275,321,
                        312,457,519,549**
Routine Name: IBCEMMR
   Before: B56465782 After: B216048164 **155,366,528,549**
Routine Name: IBCMDT
   Before: n/a After: B47701451 **549**
Routine Name: IBCMDT1
   Before: n/a After: B32717848 **549**
Routine Name: IBCMDT2
   Before: n/a After: B30988652 **549**
Routine Name: IBCMDT3
   Before: n/a After: B9544257 **549**
Routine Name: IBCNBCD
   Before: B99061672 After:B122951188 **82,251,361,371,416,438,452,

497,528,549**
Routine Name: IBCNBLL
  Before: B144703884   After:B147621313 **82,149,153,183,184,271,345,
                  416,438,435,506,519,528,549**
Routine Name: IBCNCH
  Before: n/a   After: B89930576 **549**
Routine Name: IBCNCH2
  Before: n/a   After: B47844912 **549**
Routine Name: IBCNCH3
  Before: n/a   After: B90566636 **549**
Routine Name: IBCNEDE
  Before: B34057908   After: B35084322 **184,271,300,416,438 ,497, 549**
Routine Name: IBCNEDE1
  Before: B48152754   After: B49194842 **184,271,416,438,435,467,497,
                  528,549**
Routine Name: IBCNEDE2
  Before: B63879348   After: B81972539 **184,271,249,345,416,438,506,549**
Routine Name: IBCNEDE5
  Before: B28666402   After: B29541392 **184,271,416,497,549**
Routine Name: IBCNEDEP
  Before: B88960339   After: B91001263 **184,271,300,416,438,506,533,549**
Routine Name: IBCNEDST
  Before: B47395616   After: B57795358 **497,506,549**
Routine Name: IBCNEHL1
  Before:B215626728   After: B181786202 **300,345,416,444,438,497,506,549**
Routine Name: IBCNEHL5
  Before: B11250093   After: B40778838 **497,549**
Routine Name: IBCNEHLM
  Before: B28096778   After: B23803518 **184,251,300,416,438,497,506,549**
Routine Name: IBCNEHLT
  Before: B80145618   After: B100567838 **184,251,271,300,416,438,506,549**
Routine Name: IBCNEHLU
  Before: B88168048   After:B104037838 **184,300,416,438,497,549**
Routine Name: IBCNEKIT
  Before: B54158297   After: B55673167 **184,271,316,416,549**
Routine Name: IBCNERP1
  Before: B87784206   After: B87896793 **184,271,416,528,549**
Routine Name: IBCNERPF
  Before: B17142142   After: B35587922 **416,528,549**
Routine Name: IBCNERPG
  Before: B15763271   After: B51210670 **416,528,549**
Routine Name: IBCNERPH
  Before: B26306975   After: B48112420 **416,528,549**
Routine Name: IBCNERTQ
  Before: B44184624   After: B44950178 **438,467,497,549**
Routine Name: IBCNES1
  Before:B145502085   After:B145689947 **416,438,497,549**
Routine Name: IBCNES3
  Before: B25873283   After: B27490264 **497,549**
Routine Name: IBCNES4
  Before: n/a   After: B22279537 **549**

Routine Name: IBCNEUT7
  Before: B3520436   After: B72027534 **184,549**
Routine Name: IBCNHUT2
  Before: B47011114   After: B92403346 **519,549**
Routine Name: IBCNICB
  Before: B139240420   After: B144732955 **413,416,528,549**
Routine Name: IBCNICB2
  Before: n/a   After: B5848128 **549**
Routine Name: IBCNILK
  Before: n/a   After: B142073526 **549**
Routine Name: IBCNSJ1
  Before: B20445823   After: B22191790 **28,549**
Routine Name: IBCNSJ5
  Before: B19961411   After: B31714664 **43,516,549**
Routine Name: IBCNSM1
  Before: B21887577   After: B24284030 **28,56,549**
Routine Name: IBCNSM31
  Before: B21467883   After: B23516960 **6,28,68,413,497,516,549**
Routine Name: IBCNSP
  Before: B79133086   After: B77034837 **6,28,43,52,85,251,363,371,
                        416,497,516,528,549**
Routine Name: IBCNSP1
  Before: B60114361   After: B78908703 **6,28,40,43,52,85,103,361,371,
                        377,497,549**
Routine Name: IBCNSP11
  Before: B11721673   After: B15254637 **28,43,85,103,137,251,399,516,549**
Routine Name: IBCNSP3
  Before: B85952229   After: B38303205 **28,52,85,251,371,497,528,549**
Routine Name: IBCNSU2
  Before: B19732446   After: B25020492 **28,62,497,549**
Routine Name: IBCNSUR
  Before: B24287477   After: B24782605 **103,276,506,516,549**
Routine Name: IBCNSUR1
  Before: B57694333   After: B169714351 **103,225,276,516,549**
Routine Name: IBCNSUR3
  Before: B6612795   After: B6784776 **276,549**
Routine Name: IBCNSUR4
  Before: n/a   After: B155856313 **549**
Routine Name: IBCOMA
  Before: B24000522   After: B58613523 **103,528,549**
Routine Name: IBCOMA1
  Before: B45473488 After: B81021832 **103,516,528,549**
Routine Name: IBCOPP
  Before: B15985691   After: B31702280 **28,62,528,549**
Routine Name: IBCOPP1
  Before: B10507720   After: B23382519 **28,528,549**
Routine Name: IBCOPP2
  Before: B22994194   After: B66671846 **28,62,93,516,528,549**
Routine Name: IBCOPP3
  Before: B15474438   After: B54551933 **28,516,528,549**
Routine Name: IBJPI

Before: B21646408   After: B42432107 **184,271,316,416,438,479,506,
                   528,549**
Routine Name: IBJTNB
   Before: B12471886   After: B12738894 **39,549**
Routine Name: IBY549PO
   Before: n/a   After: B123219661 **549**

Routine list of preceding patches: 39, 56, 528, 533

===
User Information:
 Entered By   : DAMICO,VITO   Date Entered   : MAR 25,2015
 Completed By: Date Completed:
 Released By   :   Date Released   :
===

3   Backout and Rollback Procedures

3.1 Overview of Backout and Rollback Procedures

The rollback plan for VistA applications is complex and not able to be a "one size fits all" solution. The general strategy for a VistA rollback is to repair the code with a follow-up patch. The development team recommends that sites log a ticket if it is a nationally released patch. If not, the site should contact the product support team directly for specific solutions to their unique problems.

3.2 Backout Procedure

During the VistA installation procedure of the KIDS build, the installer can back up the modified routines using the 'Backup a Transport Global' action. The installer can restore the routines using the MailMan message that was saved prior to the installation of the patch. The backout procedure for global, data dictionary and other VistA components is more complex and will require issuance of a follow-up patch to ensure all components are properly removed. All software components (routines and other items) must be restored to their previous state at the same time and in conjunction with the restoration of the data. This backout process may need to include a database cleanup process.

Please contact the product support team for assistance if the installed patch that needs to be backed out contains anything at all besides routines before trying to backout the patch. If the installed patch that needs to be backed out includes a pre or post install routine, please contact the product support team before attempting the backout.

From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following option:
- Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DD's or templates.

Note: When prompted for the INSTALL enter the patch #.

3.3 Rollback Procedure

The rollback procedure for VistA patches is complicated and may require a follow-up patch to fully roll back to the pre-patch state. This is due to the possibility of Data Dictionary updates, Data updates, cross references, and transmissions from VistA to offsite data stores.

Please contact the product development team for assistance if needed.

4 Enhancements

4.1 Technical Modifications

The following features of the IB software will be affected by this project.

4.1.1 Electronic Insurance Verification (eIV)

The following modifications have been made to eIV:
- eIV data extracts and eIV Request Electronic Insurance Inquiry.
    - eIV Appointment extract will include Prescription only coverages.
    - eIV Appointment extract will include Prescription type of plans.
    - eIV Appointment extract will exclude specific types of coverages.
    - eIV Appointment extract will exclude specific types of plans.
    - eIV Request Electronic Insurance Inquiry will allow inquiries for deceased patients, but will not use Date of Death (DOD) as the service date.
- eIV processing and transmission:
    - eIV Auto Update will only update active policies.
    - "IIV EC" Health Level Sever (HL7) logical link will use a domain name.

4.1.2 Integrated Billing Screen Modifications

This project made modifications to several screens in Integrated Billing:
- Date of Death:
    - When a patient is marked as deceased in Veterans Health Information Systems and Technology Architecture (VistA), their active policies will automatically be termed.
    - Patient Policy information screen will reflect the patient's date of death.
- Security Key:
    - Existing "IB GROUP PLAN EDIT" security key is required to edit Coverage Limitations (action CV) within:
        - The Insurance Company Entry/Edit option on the Insurance Company screen.
        - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
    - Existing "IB GROUP PLAN EDIT" security key is required to edit Annual Benefits (action AB) within:
        - The Insurance Company Entry/Edit option on the Insurance Company screen.
        - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
    - Existing "IB GROUP PLAN EDIT" security key is required to edit Change Plan Info (action PI) within:
        - The Insurance Company Entry/Edit option on the Insurance Company screen.
        - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
    - Existing "IB GROUP PLAN EDIT" security key is required to edit UR Info (action UI) within:
        - The Insurance Company Entry/Edit option on the Insurance Company screen.
        - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
    - Existing "IB GROUP PLAN EDIT" security key is required to Inactivate a Plan (action IP) within:
        - The Insurance Company Entry/Edit option on the Insurance Company screen.
        - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
    - Existing "IB GROUP PLAN EDIT" security key is required to Edit Comments (action PC) within the Insurance Company Entry/Edit option on the Insurance Company screen.

- o Existing "IB GROUP PLAN EDIT" security key is required to Fast Edit All (action EA) plan specific information within the Patient Insurance Info View/Edit option on the Patient Insurance screen.
- Process Insurance Buffer option and eIV Response data:
    - o Insurance Buffer will no longer allow a user to directly access the eIV Response Report via RR action.
    - o Insurance Buffer's expand benefit (action EB) will include additional eIV Response data.
    - o Insurance Buffer's accept entry (action AE) process will allow acceptance of additional eIV Response data.
    - o Insurance Buffer will display all Medicare entries to all users.
- Patient Insurance screen (Patient Insurance Info View Entry/Edit option):
    - o Patient Insurance screen will display additional eIV Response data.
    - o "Policy Not Billable" prompt will be modified to "Stop Policy From Billing" to make it more clear to the user.
- Insurance Company screen (Insurance Company Entry/Edit option):
    - o The Expand Benefits action (EB) will display additional eIV Response data.
- Enhance VistA Insurance Capture Buffer (ICB):
    - o ICB will not create a new insurance company if the user lacks the proper security key.
    - o ICB will not create a new group plan if the user lacks the proper security key or it already exists.
- Enhance VistA Data Dictionary (DD):
    - o Create new entry in the file TYPE OF INSURANCE COVERAGE (#355.2).
    - o Create new entry in the file TYPE OF PLAN (#355.1).

4.1.3 Reports

This project created or modified the following reports:
- List Plans by Insurance Company report:
    - o Added additional filters.
    - o Modified the report layout.
- Patients without Medicare Insurance report:
    - o Modified user prompts.
    - o Added a new filter based on appointment date.
    - o Modified the report layout.
- Active Policies with no Effective Date report:
    - o Added additional filters.
    - o Modified the report layout.
- eIV Auto Update Report (currently known as the eIV Patient Insurance Update Report):
    - o Renamed eIV Patient Insurance Update report to eIV Auto Update Report.
    - o Updated the user prompts.
    - o Modified the report to display only those patient insurance entries that were updated by eIV Auto Update.
    - o Modified the report layout.
- Creation of new Insurance Plans Missing Data report:
    - o Create new report that allows a user to search for missing data within active insurance companies.
    - o Users may search the following fields in the GROUP INSURANCE PLAN file (#355.3) looking for missing data:
        - GROUP NUMBER (#2.02).
        - TYPE OF PLAN (#.09).
        - PLAN STANDARD FTF (#.16).

- PLAN STANDARD FTF Value (#.17).
- ELECTRONIC PLAN TYPE (#.15).
- BANKING IDENTIFICATION NUMBER (#6.02).
- PROCESSOR CONTROL NUMBER (PCN) (#6.03).
  o Users may search for missing plan coverage limitations that are found in the PLAN COVERAGE LIMITATIONS file (#355.32).
- Modifications to the worklist, Move Subscribers to a Different Plan:
  o Added functionality so that a user may move individual patients instead of an entire group if they desire.
  o Added additional user prompts.

4.1.4 Patient Policy Comment Modifications

The following modifications have been made to Patient Policy Comments:
- Insurance Comments (Patient Insurance Info View Entry/Edit option):
  o Provided ability to capture additional data for patient policy comments.
  o Removed the "Insur. Contact Inf. (IC)" action from the Patient Policy Information screen.
  o Removed the Insurance Comment (last) section from the Patient Policy Information screen.
  o Added new "Group Plan Comment (GC)" action to the Patient Policy Information screen.
  o Added ability for users to view the historical list of patient policy comments.
  o Provided search functionality for historical patient policy comments.
- Insurance Comments (Claims Tracking screens/options):
  o Added new "Pt Policy Comments (PT)" action to claims tracking screens.
  o Added ability for users to view the historical list of patient policy comments.
- Insurance Comments (Third Party Joint Inquiry (TPJI) option):
  o Added new "Pt Policy Comments (PT)" action to TPJI when PATIENT NAME is selected. Selecting by BILL NUMBER in TPJI has not been modified.
  o Added ability for users to view the historical list of patient policy comments.

4.1.5 IV Site Parameters

The following modifications have been made to IV Site Parameters:
- IV Site Parameters:
  o Redesigned user screen.
  o Allows edit functionality of the following data elements:
    - Medicare Payer.
    - HMS Directory.
    - EII Active
  o Displays in view only mode:
    - Retry Flag.
    - Timeout Days.
    - Timeout Mailman Msg.
    - Number Retries.
    - Default Service Type Code.
    - HL7 Maximum Number.
  o Removed functionality of the following data elements:
    - Contact Person.
    - Contact's phone number.
    - Contact's email address.
  o Added the following new data elements:
    - Master Switch Realtime.

- Master Switch Nightly.

    o Removed edit abilities for the data elements:
- Failure Mailman Msg.
- Messages Mailgroup.

4.1.6 National Insurance File Interface Modifications

The following modifications have been made to the National Insurance File Interface:
- Sending HL7 messages to the NIF:
  - VistA now checks the IB NIF TCP entry in the HL7 logical link and verifies that it is up and running. An email is generated and sent to VHAeInsuranceRapidResponse@va.gov when the IB NIF TCP entry needs to be restarted/bounced.

4.2 Issue Resolutions

4.2.1 New Service Requests (NSRs)

This patch addresses the following New Service Request (NSR):
NSR 20140413 - Medical Care Collection Fund (MCCF) eInsurance Compliance Phase 3

4.2.2 Defect Tracking System Tickets

There are no defect tracking system tickets associated with this patch.